

How-To Checklist for the DD Form 2656-7

(DD 2656-7 — Verification for Survivor Annuity)

The DD Form 2656-7 is used to establish the Survivor Benefit Plan after the passing of an active, reserve, or retired military service member.

Additional help in filling out the DD 2656-7, including a Form Wizard and a how-to video, is available on the Start an SBP Annuity webpage at www.dfas.mil/retiredmilitary/survivors/ApplySBP

This checklist is designed for use by the **spouse** (widow or widower), **eligible former spouse**, or **child** of a deceased military member/retiree.

Quick Tips

1. To avoid delays, make sure your form is:

✓ **Signed and dated by the claimant**

✓ **Complete, including:**

* **SSNs for both deceased member and claimant**

* **Date of birth, mailing address, and country of citizenship of claimant**

* **Date of marriage if claimant is a spouse**

* **DIC info (part 6) if claimant is a spouse**

✓ **Sent with supporting documents (see list below)**

* If claim is signed by someone on behalf of claimant, supporting documentation is required.

2. The claimant is the living beneficiary.

Supporting Documents Required

- * Copy of Death Certificate, if deceased retiree - Must include cause of death
- * DD 1300 Report of Casualty, if line of duty death of a service member
- * IRS Form W4P - To have federal taxes withheld from the annuity
- * FMS 2231 (Fast Start Direct Deposit Form) - To have payments directly deposited to your bank account
- * Citizenship Affidavit - Only needed if the claimant lives outside of the United States and is anyone other than the member's child
- * IRS Form W8-BEN - Only needed if the claimant is a nonresident alien and their country of citizenship has a tax treaty with the United States
- * DD Form 2790 (Custodianship Certificate of Minor Child) - Only needed if a claimant is a minor (under age 18)
- * DD 2788 (Child Annuitant's School Certification) - Only needed if the claimant is a member's child over age 18 but under age 22 and attends school full-time
- * Legal Representative Documentation - Only needed if someone signs on behalf of the claimant. Supporting documentation such as a Power of Attorney, Guardianship, or Representative Payee must be included.

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Filling out the Form

Part 1: Enter the deceased military member's/retiree's information

- a. Name of deceased member
- b. Social security number of deceased member
- c. Date of birth of deceased member
- d. Date of death of deceased member
- e. Enter the name of the branch of service of the deceased member: Army, Marine Corps, Navy, or Air Force
- f. Enter the deceased member's rank or rate

Part 2: Enter the claimant's information

- a. Name of claimant
- b. Social security number of claimant
- c. Date of birth of claimant
- d. Telephone number of claimant
- e. Country of citizenship of claimant
- f. Check the box if the claimant is a nonresident alien
- g. Select the type of benefit claimed: Survivor Benefit Plan (SBP), Reserve Component Survivor Benefit Plan (RCSBP), or Retired Serviceman's Family Protection Plan (RSFPP)
- h. Select the claimant's relationship to the deceased member: spouse, child, former spouse, or insurable interest
- i. Enter the claimant's correspondence (mailing) address

Part 3: Fill out if claimant is the spouse (widow or widower) of the deceased member

- a. Answer Yes or No: Was the claimant legally married to the deceased member on the date of death? (1) If yes, enter date of marriage. (2) If no, enter date of divorce.
- b. Answer Yes or No: Does the deceased member have children under the age of 23 or children that are incapacitated? If yes, enter (1) name(s), (2) SSN(s), and (3) date(s) of birth.
- c. Answer Yes or No: Is the claimant receiving any other annuity paid by DFAS based on the military record of any other deceased military service member (for example, benefits from a former spouse)? If yes, enter the deceased military member's information: (1) name, (2) SSN, (3) Type of benefit: SBP or RSFPP, and (4) monthly benefit amount.

Part 4: Fill out if claimant is the child of the deceased member

- a. Answer Yes or No: Are you married?
- b. Answer Yes or No: Are you over the age of 18 but under the age of 22 and a full-time student?

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Filling out the Form - continued

Part 5: Fill out if claimant is the eligible former spouse of the deceased member

- a. Enter the date of divorce from the deceased member
- b. If you remarried **this member** after divorce, enter the date of remarriage

Part 6: Fill out if claimant is the spouse (widow or widower) of the deceased member

- a. Answer Yes or No: Have you applied or are you receiving Dept. of Veteran's Affairs (VA) benefits? If No, continue to Part 7. If Yes, enter the VA claim number in box (1), VA monthly award amount in box (2), and the mailing address of the VA Office handling your account in box (3).

Part 7: Important - Remember to sign and date your form!

- The claimant or their authorized representative must SIGN in box (a) and DATE in box (b). If signed by a legal representative, legal documents must be included.

Submitting Your Claim

Send your completed form and documents (keep a copy of your signed form):

Online upload:

Upload a PDF of your completed/signed form and supporting documents via the AskDFAS online upload tool on DFAS.mil (this link is case-sensitive):

<https://go.usa.gov/xVutz>

Or mail to:

Defense Finance and Accounting Service
U.S. Military Annuitant Pay
8899 E 56th Street
Indianapolis, IN 46249-1300

Or fax to:

800-982-8459

Reminders

- Is your form signed and dated by the claimant or the claimant's custodial natural parent, legal representative, guardian, or custodian?
- Is your form complete, including: SSNs for both deceased member and claimant; date of birth, mailing address, and country of citizenship of claimant; date of marriage and DIC info (part 6) if claimant is a spouse
- Did you include supporting documents, if needed?
 - ✓ Death certificate listing cause of death, if needed?
 - ✓ DD 2790, if needed?
 - ✓ DD 2788, if needed?
 - ✓ Legal representative documentation, if needed?
 - ✓ Check page 1 of this checklist for additional documents that may be needed

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